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ABSTRACT

A recent study conducted by a midwestern university research center surveyed 47 school districts who were members of a university-school district collaborative. Respondents indicated that the changing roles of teachers and principals were an important issue. This paper presents findings of a subsequent study based on indepth interviews with the superintendents of the 47 member school districts that were representative of mid-western school systems ranging from large urban to small rural districts. All superintendents reported that they were trying to implement second-order, or systemic, changes. All districts used a state-mandated Planning, Evaluation, and Review (PER) process as a vehicle for initiating role changes. Most districts relied on staff-development and inservice programs to help with teacher/principal role changes. In 60 percent of the districts, staff-development and inservice decisions were made at the building level. Role change was more easily initiated at the elementary level. Eighty percent of the superintendents said that parents and community members were involved in almost every aspect of the district and in individual building decision-making processes. All said that the building principal played a key role in educational change, but that there was a lack of clarity among principals about their own roles. Thirty-five percent of the districts had some form of school-based management in place. Teachers were interested in making decisions about curriculum, instruction, and staff development, but did not seek to control schools or districts. Sixty-seven percent said that changes have been institutionalized to give teachers greater voice in building-level decisions. Most superintendents believed there is a movement toward genuine collaboration and teacher/principal role changes. Four examples of teacher/principal role-change efforts are described. A copy of the interview protocol is included. (Contains 11 references.) (LMI)

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DISTRICT INITIATIVES:

REFORMING TEACHER and PRINCIPAL ROLES

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October 1995

DISTRICT INITIATIVES

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ABSTRACT

The topic, changing roles of teachers and principals, was ranked by 54.9 percent of forty-seven mid-western school districts as one of the three most important issues for research and as "very" or "extremely" important by 88.1 percent of the districts. The districts interviewed ranged from urban to rural and were members of a university-school collaborative. A round of surveys was followed by forty-seven in-depth superintendent interviews.

Findings indicate that role changes are happening. Some districts are making more changes than others. A spectrum of role changes and participatory decision making models are reported. Four representative districts are highlighted.

DISTRICT INITIATIVES:

REFORMING TEACHER AND PRINCIPAL ROLES

A recent survey by a mid-western university research center was conducted to ascertain the educational issues of greatest interest to forty-seven school district members of a university-school district collaborative. The topic, changing roles of teachers/principals, was ranked by 54.9 percent of the districts as one of the three most important issues for research and as "very" or "extremely" important by 88.1 percent of the respondents. To address districts' interest in the issue, changing roles of teachers/principals, indepth interviews were undertaken with all the superintendents of the member districts. The interviews identified teacher/principal role changes, the variety of methods most often used to initiate those changes, and where authority was actively being decentralized.

METHODS

This paper reports the results of indepth interviews of superintendents in the member school

districts. Districts participating in the interviews were representative of mid-western school systems that ranged from large urban to small rural districts. Superintendents were interviewed because they were the district representatives in the collaborative. Each district was contacted by mail and then by telephone to arrange interview appointments. The superintendents interviewed were cooperative, supportive, and informative during the 30 minute open-ended interviews.

In addition to the survey results, four districts are highlighted. The variety of change initiatives implemented in the districts are described.

FIRST ORDER CHANGE EFFORTS

Cuban (1988) suggests that there are several types of planned change. First-order changes maintain the status quo and attempt to address change through greater efficiency and effectiveness. First-order changes try to make what already exists more efficient and more effective without disturbing the basic organizational structure.

All forty-seven district superintendents reported

first-order changes. There were considerable variations in the types and magnitude of first-order changes districts intitiated and the implications of these changes. Respondents reported interest in recruiting the best educators available, raising salaries wherever and whenever resources permited, and allocating resources equitably. Teachers and principals selected textbooks, examined curriculum content and course work, and scheduled people and activities more efficiently. While first-order changes were found in all school districts, first-order changes did not change teacher and principal roles. For the most part, first-order changes maintained the status quo.

SECOND ORDER CHANGE EFFORTS

The second type of changes referred to by Cuban (1988) are what he calls "second-order" changes. Second-order changes seek to fundamentally alter the organization. Second-order changes are systemic changes. Such changes attempt to alter existing authority, roles, and uses of time and space. All

superintendents interviewed reported that they were attempting to implement second-order changes in their respective districts. Some attempts were more ambitious and unique than others. What follows are reported second-order change initiatives.

CURRICULUM PLANNING

All districts reportedly used a state mandated Planning, Evaluation, and Review (PER) process as a vehicle for initiating role changes. PER requires school districts to examine their curriculum on an on-going and regular basis with parental input. Role changes were most often associated with and related to curriculum work. All superintendents reported that teacher involvement in curriculum design, curriculum and course content revision, and textbook selection had increased.

Many superintendents also reported the use of curriculum planning models other than PER. These models were locally developed and implemented. They ranged from centralized models with a full-time district level curriculum coordinator to more

decentralized models that used building level curriculum planning committees as a vehicles to augment the autonomy and authority of building staff. In addition to curriculum work, staff development and in-service were reportedly used to promote role changes.

STAFF DEVELOPMENT AND IN-SERVICE

All districts relied on staff development and in-service to help with teacher/principal role change. Staff development and in-service were the primary means used to promote role change. The amount of staff development and in-service input from building personnel varied from district to district.

In 60 percent of the districts, staff development and in-service decisions were made at the building level. The faculty within each building had total autonomy over staff development and in-service budgets and over content. In the remaining 40 percent of the districts, staff development and in-service were coordinated on a district-wide basis by a full-time individual. In these districts, teacher input was limited. In-service topics included everything from

district initiated and directed programs on instructional methods, to topics such as teacher wellness and school climate, to opportunities that brought speakers into the districts or sent personnel out of the districts to workshops.

Administrative role change efforts through in-service were less formalized than teacher efforts. However, staff development and in-service also were utilized to assist principals to accommodate role change. Unfortunately, in-service did not focus on topics or issues specific to the needs of building level administrators. Only a handful of districts sponsored programs and retreats designed to meet the professional needs of administrators. All principals had access to state-wide administrative training programs such as the Blandin Principal Fellowship, the Bush Leadership program, and the State Principal's Academy. A majority of role change reportedly occured on an informal basis at the building level, especially at the elementary level.

ELEMENTARY SCHOOLS

The superintendents reported that change for teachers and principals was more easily initiated on the elementary level than on the secondary level. When asked why this might be the case, a majority of the respondents indicated that the lack of departmentalization, the lack of competition for students or funds between departments, and the absence of many co-curricular activitiy created more flexibility at the elementary level.

It was reported that elementary schools are usually smaller in student population than secondary schools. Respondents believed that smaller schools foster an atmosphere that is more cooperative, more conducive to collaboration, and to teacher participation in the decision making process. Respondents felt there was a greater sense of isolation among both teachers and principals at the secondary level. The superintendents expressed concern that feelings of isolation contributed to role change resistance.

ISOLATION

Respondents speculated that teacher isolation stemmed from subject-based and grade level specialization. Isolation created barriers to communication between teachers and between teachers and principals. Respondents indicated that teachers reported that feelings of isolation created feelings of fragmentation and separation from other teachers and other buildings in the district. Lambert (1988) explains that teachers resist efforts to break down feelings of isolation in two major ways: avoidance and trivialization. They avoid their co-workers, become isolates, and trivialize their contacts with students.

TEACHER ORGANIZATIONS

Interviews indicated that teacher unions or organizations were supportive of teacher/principal role changes. Collective bargaining played little if any part in the role change process according to over 90 percent of the respondents. Teacher unions or organizations were viewed as being collaborative rather

than adversarial. Many superintendents indicated that this sense of collaboration was a recent phenomenon, emerging only in the last four to six years. Prior to that time, teacher - administration relations were much more adversarial.

Sixteen percent of the superintendents interviewed indicated that their districts had been involved in a teacher strike. In all instances where a strike took place, the respondents expressed that the strike had temporarily devastated school-community relations. They felt that trust had been broken between the district, the teachers, the community and between teachers and administrators. The respondents said that trust once broken was difficult to rebuild. Ultimately, with time and candid dialogue, trust reportedly was again established in these districts. A sense of collaboration eventually evolved from the conflict. Interestingly, some respondents expressed that the strikes provided a foundation and stimulus for positive change in their districts.

CHANGE INTITIATORS

District Initiatives

The superintendents identified a number of sources of pressure to change teacher/principal roles. These sources of change ranged from more adversarial to more collaborative relationships. Sources of change were identified as teacher unions/associations and school districts, school boards, superintendents themselves, parents and community members, teachers, and the general nature of the times. The respondents believed that society is seeking greater productivity and accountability on the part of their schools. All respondents reported opportunities for community and parental input on building as well as district levels.

Parent/Community Participation

The degree of meaningful parent/community participation varied from district to district. In some districts, parent/community participation in district decisions were limited to school board, PTA/PTO, or PER meetings. Eighty percent of the superintendents reported that their district's parents/community members were involved in virtually every aspect of the district and individual building

decision-making process. Approximately 30 percent of the superintendents reported that parents were also involved in staff hiring.

Principals

The building principal was reported to be a key figure in the change process. All superintendents surveyed indicated that the building principal was central to effecting and implementing positive change at the building level. This perspective is supported by the research and literature reviewed. According to the American Association of School Administrators (1988) twenty years of studies clearly underscore the pivotal role of the principal. Achilles and Smith (1994) suggest that successful leaders increase power by using it. Such leaders use their power to empower their followers. Conversely, power was also used by leaders to limit others and resist change.

Some of the respondents, while they viewed principals as central to the change process, saw principals as resistors to change rather than stimulaters of change. Those superintendents indicated

that there seemed to be a lack clarity among these principals as to change direction. Principals were reportedly uneasy about what their new role would be. All respondents reported various levels of confusion and anxiety among their principals. Principals were reportedly not clear about what was being asked of them. Superintendents expressed that it seemed much easier for their principals to envision what the teachers' changing role would look like than it was to project their own new role. Many districts reportedly were dealing with principal uncertainty and anxiety by allowing principals to voluntarily initiate change or not. In several instances, principals were given veto power over building level decisions.

School-Based Management

One popular model implemented to support teacher/principal role change was some form of school-based management (SBM). Approximately 35 percent of the superintendents interviewed reported a spectrum of school-based management models in place. These programs varied from minimal increases in teacher

decision-making to broad based decentralization of decision making. In the most extreme example of changed teacher/principal roles, building policy decisions were made by a teacher committee and overseen by the district superintendent. No principal existed.

School-based management programs provided the greatest opportunity for teacher autonomy and role change. These programs reportedly provided the basis for a greater sense of ownership and desire for participation on the part of teachers.

Teacher Empowerment

Superintendents believed that greater teacher empowerment was due to greater opportunities for teacher involvement in the process. Teachers respond favorably to increased teacher involvemnent in decision making (Blase & Kirby, 1992). When teachers make decisions, see their ideas implemented, and feel pride in those decisions, they are further stimulated to participate and generate new ideas. There are limits to teacher involvement.

Teachers reportedly are not interested in

involvement in decision making when it interferes with teaching responsibilities or seems token (High & Achilles, 1986; High, Achilles, & High, 1989). Several of the superintendents expressed the belief that the best perceptions and insights into what is needed in schools and classrooms rests with teachers, those directly in contact with the students.

Generally speaking, it was the feeling of the superintendents that teachers did not want to control schools or school districts. Teachers were reportedly interested in involvement in substantive issues of curriculum and instruction but prefered not to be bothered with details of scheduling or maintaining the status quo; they do not actively seek extensive involvement in personnel issues (Alutto & Belasco, 1972; High & Achilles, 1986; High et al., 1989; Imber & Duke, 1984; Mohrman, Jr., Cooke, & Mohrman, 1978). What is reflected from the survey respondents and in the literature is that teachers want a greater opportunity, a greater voice, to make decisions, but more often than not, those decisions are only in areas

that directly affect them on a building level such as curriculum, staff development, and in-service. Discussion about greater teacher participation often leads to expressions of fear on the part of administrators concerning their roles and responsibilities. It was reported that teachers were not interested in policy making. Respondents stated that teachers do want legitimate participation, not control.

FOUR MEMBER DISTRICTS

What follows are four examples of teacher/principal role change efforts reported underway among the districts interviewed.

DISTRICT A

District A is a large school district located in an urban setting. The district has a myriad of implemented activities related to teacher/principal role changes.

The district's central focus and goal is the improvement of educational opportunities for all students. Although these goals are similar to the

efforts of most of the other member districts, District A seems to have a package that works better than most district-wide efforts in many urban systems.

School-based management, appears to be the difference and at the core of District A's change efforts. School-based management is being initiated on a gradual basis throughout the district. A combined committee of teachers and administrators have submitted a report outlining implementation parameters and expectations. The plan will begin in six schools: two elementary, two middle, and two secondary on an initial two year basis, and then will be followed by all schools. Program involvement is voluntary. In addition to the district-wide school-based management committee, there are a variety of committees at work in the district.

All district wide committees, including the PER committee, actively involve parents as well as school personnel. There is a parent's committee in each school that meets monthly and acts in an advisory capacity. There also is a "Professional Issues

Committee" whose goal is to enhance opportunities for students. Representatives from the leadership of both faculty and administration sit on this committee. Results and recommendations of the committee go directly to the school board. There is an intensive staff development program for teachers. The program is guided through district staff development teams and through individual school committees. Each school committee has control over a portion of the funds available for staff development and in-service.

All administrators in the district must go through the state Administrator Assessment Center. This process is used as a resource to improve administrator's strengths and weaknesses. In addition, the district has created its own administrator's academy to provide common and on going in-service training to all administrators in the district. An annual theme is chosen. District administrators gather at a fall retreat and then again four times throughout the year. Furthermore, District A is the only school district in the state to have been awarded a Federal

grant to train administrators. The Federal Grant allowed District A to open their in-service program to administrator participants from throughout the state.

Finally, the district has initiated a program designed to provide training and learning opportunities for district personnel who want a position in administration, but who are not licensed administrators. Participation in the program requires a two year commitment on the part of the individual. During this time period, either the district or the participant can terminate the program. If program termination occurs the participant goes back to their previous teaching assignment.

District A believes this training opportunity improves the quality of administrative candidates from within the district, gives the district an opportunity to look at the person's skills as an administrative candidate, and if the person decides to go back to the classroom, he or she will go back with some administrative training, a better understanding of what administration is all about, and an expanded view of

the district.

Emphasis on teacher/principal role change in District A appears to balance support and training for both teachers and principals.

DISTRICT B

District B is a suburban school district. It is one of the few districts in the state that has a fully implemented school-based teacher management program. East Elementary is run collaboratively by three teachers. The group assumed the traditional role and responsibilities of a building principal. East is a school with approximately 200 students. The district received a grant from a local corporation which, in addition to district monies, was given directly to the school.

On a district-wide level, teachers are included in staffing decisions, are examining the issue of differentiated staffing, and are working on a taxonomy of appropriate teacher roles and responsibilities. The State Department of Education provided a grant that

helped establish a Mentorship Program for first year teachers. This is a collaborative program with two local universities. The district also instituted a fifth year teacher's internship program. Finally, the district initiated a new staff development program that is peer based and has teachers as peer coaches. There are many examples within the district of teacher willingness to become involved in instructional improvement.

The District B teacher organization contacted the state Education Association and requested approval for East elementary to be chosen as a state learning laboratory. Although not formally approved by the National Education Association, the request indicates district teacher activism and desire to provide impetus in teacher/principal role change efforts. The district was one of sixteen pilot sites for outcome based education in the state.

Administrators in the district have not been left out of the planning and change process. There is a great deal of concern within the district for

principals as well as teachers to assist all to understand and accommodate new evolving roles.

The major impetus for teacher/principal role change in District B, while supportive of administrators in the district, seems to be on changing teacher roles.

DISTRICT C

District C is an urban school district located in the northern third of the state. The district has initiated what they call a Quality Worklife System. This system consists of a Quality Worklife Committee that acts as a district-wide bargaining unit that discusses management and policy issues. There are two co-chairs, the superintendent and a designated representative of the teacher's union. Membership on the committee is determined by each of eleven sub-bargaining units. Each individual building or sub-bargaining unit has a committee that represents all building personnel including custodians, food service personnel, and other non-instructional personnel. The goals of the sub-units are to provide information to

the district level group, to solve local building problems without going through the district grievance process, and to engage and assist in building planning.

The Quality Worklife Committee and sub-committees were initiated to move away from a traditional top-down management model and toward a more participatory, bottom-up model of decision making. The principal in each building continues to make the final decisions, but is expected to demonstrate respect for and inclusion of the participatory decision-making process.

District C employs a full-time coordinator for the Quality Worklife System. This person works in the capacity of executive director, has had nation training in participatory decision-making and provides in-service to buildings and committees on this topic. One of the significant issues mentioned in the interview was that it took four or five years to go from training personnel in the decision making process to actually being able to deal with issues of substance.

District C's approach to teacher/principal role change is a step toward participatory decision making

while maintaining a semblence of heirarchy.

DISTRICT D

District D is a rural school district in the northern part of the state. The district initiated a team approach to school-based management. All personnel in each of the district's schools received training in the participatory decision-making process. Personnel in each building in the district agree on their school budget, room assignments, individual and building goals. Principals in each building have a final veto vote over decisions. However, this vote was only exercised once in three years over a personnel matter.

In-servic training in participatory decision-making provided personnel with more ownership and involvement in the decision making process. Teachers and administrators were joined in a collaborative relationship. Joint work increased combined faculty and administration knowledge and understanding of educational issues.

DISCUSSION

Forty-seven interviews and the four district examples provide a flavor of the continuum of teacher/principal role change efforts emerging from the districts interviewed. Teacher/principal roles are changing. Shared decision-making is happening. Some districts are making more significant changes than others. A spectrum of role changes and participatory decision making models were reported among the member districts.

Despite the expressed uncertainties, problems, and concerns, there were many reported benefits gained from implementing a shared decision making model. Superintendents spoke of greater motivation and autonomy for teachers; more time for principals to concentrate on instructional leadership, more time for superintendents to concentrate on long range planning and to communicate their district visions to their constituents; and education programs that are more likely to meet students individual educational needs. The American Association of School Administrators

(1988) echoed the benefits of teacher/principal role changes reported by the districts.

Common among all member districts appears to be attempts to change the way schools were organized and controlled. Some efforts appear more rigorous than others. Many will meet with no more than modest success. Some efforts will most likely be undone.

Murphy (1988) suggests that emerging efforts and perspectives on changing authority and teacher/principal roles enable administrators to rely more on expertise than formal authority. Accordingly, teachers feel and are more empowered to make decisions. Among the member surveyed, there seem to be, at least, the beginnings of a genuine realignment of teacher/principal roles. One superintendent indicated that "...the question of changing authority and participative decision-making in public education is one of the critical issues of the present that will determine the future. This will be the central issue during our term of tenure as educators." Specific to changes in teacher/principal roles according to many of

the respondents is strategic planning.

Strategic planning reportedly played a significant part in role changes throughout the member districts. Steiner (1979) believes strategic planning identifies opportunities and threats that lie in the future. These awarenesses enable the design of a desired future and methods to reach that future. What also emerges from strategic planning is the question of how much power or authority can be shared, especially when the principal is legally responsible and accountable for decisions? Districts reportedly were struggling with this dilemma.

Sixty-five percent of the superintendents interviewed report the institution of changes that have given teachers a greater voice in building level decisions. They view these changes as teacher empowerment. Empowerment of teachers is the act of decentralization. There needs to be a balance of power and authority. People cannot be selective in their decision making, they also must be responsible for those decisions.

CONCLUSION

Educators in the districts surveyed are reported to be moving forward in the teacher/principal role change process. Varying degrees of change are taking place. There is excitement and enthusiasm. There is anxiety and uncertainty. The key is that teachers, administrators, and parents are talking about and identifying issues. There is a feeling of greater communication, collaboration, and partnership between teachers and administrators. There is an emerging sense of shared vision and purpose within a majority of the surveyed districts.

Superintendents report that pressure for change has been forced by greater community awareness and expectation. The superintendents recognize that change is a matter of necessity, a matter of survival. There is little choice. Society is demanding greater accountability. Public school districts must accelerate the change process to be competitive as more options such as open enrollment, vouchers, post-secondary enrollment options, and private sector

providers expand. The interviews indicate a growing sense among the superintendents, and their faculties, that they are all in the business of education together. The superintendents believe there is movement toward genuine collaboration and teacher/principal role changes.

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TEACHER / PRINCIPAL ROLE CHANGE
QUESTION PROTOCAL

Part A:

A1. Please give a general description of the role change efforts that are underway in your district. What do you think are its most important elements? How many years has your district been involved in this role change effort? If there isn't a district plan for role change, is there a school involved in a role change program? How many elementary/secondary schools are there in your district? How many schools in your district are involved in teacher/principal role change efforts? How many of the schools involved are elementary/secondary?

A2. Does your program follow or grow out of a particular model or strategy of teacher/principal role change and if so, what model?

A3. What was the impetus for this role change effort? (who pushed for it?)

A4. What are the objectives of the program?

A5. Do the various groups involved in the role change effort agree on these objectives? Who are the groups involved? If there is disagreement, what are the different positions and who takes these positions?

Part B:

B1. Teacher/principal role change often implies a change in how authority is allocated within the school setting. What kinds of authority or governance changes have taken place in your district or in specific schools? Do these changes include more input in schedules or scheduling, curriculum development, or purchasing? Has teacher in service and/or staff development been incorporated as part of these changes?

B2. What is being done to help people accommodate these changes? (Help people deal with their feelings about their new role.)

B3. Have teacher/principal role change efforts increased individual building autonomy?

Part C:

C1. Does the effort include any changes in the content of education such as curriculum, textbooks, ability grouping, or the promotional policies of students?

C2. What types of changes have taken place in the work of teachers, such as more input in schedules or scheduling, new authority or responsibilities? Has teacher in service and/or staff development been incorporated as part of these changes?

C3. Does the program involve any changes in relationships or governance between the school and students, parents, and/or the community?

C4. What had been the role of the teachers' union or organization in the role change effort? Has the union/organization been supportive or not? What role if any, has collective bargaining played in the role change effort?

Part D:

D1. How would you characterize the implementation of the program to this point? Have there been any problems with implementation, and if so, what were they?

D2. Has there been any difference in the implementation process between elementary and secondary schools? At which level has implementation been accomplished more smoothly?

D3. Have any programs been implemented to provide support for principals and teachers to help them accommodate their new roles? Have any training programs been implemented, and if so, what do they look like?

D4.How well do principals and teachers understand what their new role in the role change effort will look like?

D5.Have any financial or other incentives been put in place to encourage change, and if so, what are these incentives.

Or, is participation in the role change efforts voluntary?

D6. Overall, how well are the role change efforts that have taken place in your district/school working? Can you give examples of their success?

Part E:

E1. If your district or school isn't presently involved in a teacher/principal role change effort, what would you like to see happen in this regard? How would you go about initiating these changes?

E2. Do you have anything else you would like to add to this interview?